

# Seizing the Moment for Transformative Change:

A Framework for Personalized Student  
Success Planning



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OPPORTUNITY FOR ALL  
**EDREDESIGN**  
THE EDUCATION REDESIGN LAB



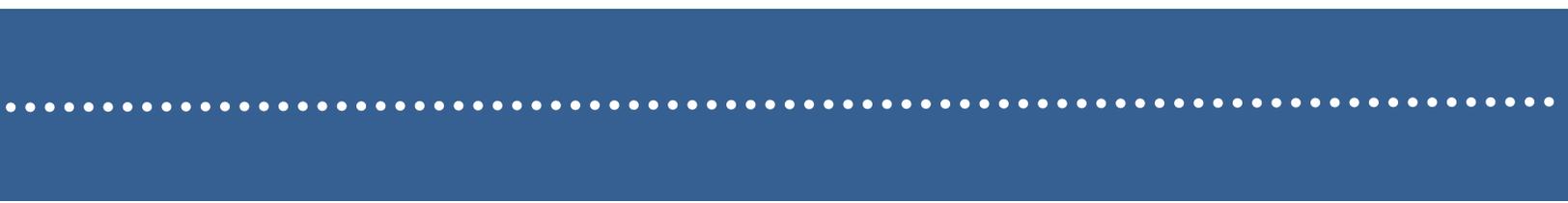
# About the Education Redesign Lab



Founded in 2014 by Paul Reville, former Massachusetts Secretary of Education and Professor of Practice of Educational Policy and Administration at the Harvard Graduate School of Education, the Education Redesign Lab (EdRedesign) is a university-based actionable research hub. In the pursuit of equity and social justice, we support the field in building cross-sector, community-wide systems of support and opportunity for children from birth to adulthood.

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# Introduction

*If we're really going to support young people's growth and development and success in a holistic way, we need people who know much more about the kids.... This is all going to be driven by having as many people as possible take time to get to know kids and families and ask them a broad set of questions. And we know that in every organization, whether we're looking at schools, communities, there are people who do that. What we're doing is now saying that's critically important, that's intentional.*

-Karen Pittman, Forum for Youth Investment, Co-Founder, Former CEO, and Senior Fellow

The Covid-19 pandemic has brought new clarity and urgency to longstanding inequities in opportunities and outcomes for children of different economic backgrounds. At the same time, the crisis offers an unprecedented opportunity to drive transformative change by combating long-standing shortcomings of our educational systems. School leaders in many places have already begun to address the multiple effects of the pandemic on students by finding new ways to support and connect with them. Others are still looking for ways to mitigate the severe impact of lost school time, disconnection, and trauma on students experiencing poverty, those with disabilities, and English learners by developing strategies to understand and address each child's unique needs.

Even before the pandemic, it was clear that a one-size-fits-all approach to education and child development is not a successful strategy. Data underscores the ineffectiveness of the current approach to schooling: children feel increasingly disengaged from school as they move through the grades,<sup>1</sup> and those living in poverty or with any special needs have outcomes that lag those who are more affluent and who do not have identified needs.<sup>2</sup> Two-thirds of the variation in children's outcomes are associated with factors outside of schools.<sup>3</sup> Stark differences across communities in access to resources and opportunities, from the quality of schools to healthcare and enrichment programs, compound and reinforce inequities. As of 2019, poverty affected 17 percent of children, equating to millions of students and families facing daily barriers and obstacles.<sup>4</sup> This number is only growing. These disparities also impact children's access to enrichment opportunities: high-income families spend over 6.5 times more money on enrichment activities for their children outside the classroom.<sup>5</sup>

Children's experiences during the pandemic have varied widely, ranging from those who have had every possible support and opportunity to aid them in keeping pace with their studies to those who have been off the grid altogether, totally disconnected from their teachers and schooling. The prospect of bringing all these children back together and batch processing them seems likely to serve no one well. However, this impersonalized,

“mass production” form of education is what schools have been doing since long before the pandemic, glossing over significant differences in learning needs as well as needs for other supports to ensure they can thrive in and outside of school. Such an approach is obviously no longer tenable. Too many children are left behind, underserved, and consequently unable to achieve success.

The antidote to this system failure is an approach common to other sectors ranging from medicine to business: personalization. Meet the patient—or in this case, the child—where they are and give them what they need. Every child needs to be seen, heard, understood, and responded to as an individual. Every child needs an advocate in the school system, a navigator who knows the child and their family and sees to it that the child’s needs are addressed by the system. No child should be anonymous any longer. Relationships matter.

A paradigm shift to personalization now seems possible in the education sector because of the heightened awareness and sense of urgency about children’s acute needs brought about by the pandemic. Indeed, many school districts have made significant steps to reach out to families and children as part of their remote work in the past year and a half. Schools have begun to move in the direction of personalization, and there is an opportunity to accelerate this trend and thereby drive transformational change in the education sector.

Personalization is not a new concept in education and child development, but the practice of supporting children individually is still the exception rather than the norm. Individual Education Plans (IEPs) for students with disabilities and Multi-Tiered System of Support (MTSS) both offer conceptual frameworks for personalization that are already embedded within schools. Organizations such as Communities In Schools, Community Schools, City Connects, BARR, City Year, and others have developed and implemented models for personalized support. Most of these models fit under the umbrella of Integrated Student Support (ISS), an approach that addresses students’ academic and non-academic needs, including mental and physical health, food assistance, and tutoring, among others. According to a review of ISS models, results are promising, suggesting improved attendance, grades, test scores, graduation, and GPAs.<sup>6</sup> However, the authors note that further research on the impact of ISS initiatives is needed. Importantly, for every dollar invested, studies show that return on investments range from at least \$3 to up to \$15.<sup>7</sup>

This report has three goals: to share the Education Redesign Lab’s (EdRedesign) latest thinking, based on our research, about the key design elements of a personalized, relationship-driven approach we call Success Planning; to highlight lessons learned so far by those implementing it; and to give examples of what personalized supports and opportunities look like and the range of approaches different schools and communities have taken to putting personalized supports in place. We synthesize what we have learned from working in partnership with EdRedesign’s *By All Means* consortium of communities who are implementing collaborative, cross-sector approaches to improving

children's wellbeing as well as from some of the other organizations who have developed models for personalizing supports and opportunities for children. We also draw from the expertise of those who have been developing and implementing their own versions of personalized supports. The intent of the Success Planning framework is not to create an additional model, but to distill and disseminate the essential elements of a personalized support approach through materials that can promote their spread and support their implementation.

In this moment of opportunity for transformative change, EdRedesign is expanding our role as a catalyst for this Success Planning by bringing together communities of practice and by continuing to research and share best practices. Our goal is to help drive a movement in which each child is known and supported as an individual with a robust, coordinated set of community-wide opportunities and resources.

## Following the Research to Find Solutions

Substantial research has shown the importance of supportive adult relationships for healthy child development and learning.<sup>8</sup> The formation of these relationships from a young age affects children's brain development, which influences their learning and behavior.<sup>9</sup> The benefits of positive adult-child relationships include higher academic motivation, improved social-emotional development, increased sense of personal responsibility, and less involvement in high-risk behaviors.<sup>10</sup>

Research also suggests that holistic strategies to support children can improve children's outcomes. One such approach is community schools, which incorporate both academic and non-academic academic supports, including health and wellness, family engagement, and youth development. According to a recent study on the New York City Community Schools Initiative, this strategy positively affected elementary, middle, and high school students' attendance, elementary and middle school students' on-time grade progression, and high school students' graduation rates.<sup>11</sup> In addition, the initiative was associated with fewer disciplinary issues for elementary and middle school students, some increased math achievement for elementary and middle school students, greater credit accumulation for high school students, and somewhat improved school climate and culture for elementary and middle schools.<sup>12</sup>

Findings like these suggest that we need a solution that offers individualized, comprehensive support strategies for each child as well as a caring adult—we use the term Navigator—who can help identify and connect to each child's needs. Schools and communities should ensure each student has an adult navigator who knows her or him individually and can act as a guide to develop a plan for success and connect her or him with the necessary academic and social-emotional supports to get back on track. Individualized Success Planning for each student can help school leaders identify and meet students' short- and long-term needs.

*The Navigation program helped me to realize my strengths and my weaknesses. I had such a big support system with the teachers. It allows us to build a relationship with the teachers. It's good to have somebody you can go to and it's such a big help to know someone is there for you.*

-Crystal Wood, East Nashville Magnet High School, Nashville, TN, 9<sup>th</sup> grade student<sup>13</sup>

## Success Planning: A Framework for Combining Supportive Relationships with Integrated Supports and Cross-Sector Collaborative Action

Success Planning should ideally not be a standalone effort, but part of a broader community-wide strategy to support children that is coordinated by a cross-sector Children's Cabinet or other governing body. There are two core elements of EdRedesign's theory of change: that communities need to work together, across sectors, to create coordinated systems of support and opportunity for children starting in early childhood and throughout the K-12 years, and that these supports and opportunities need to be personalized to meet the needs of each individual child. Both elements are essential if we are to change the trajectories of the lives of children growing up in poverty. Redesigning systems through Children's Cabinets or other coordinating bodies doesn't necessarily lead to creating mechanisms to understand and support individual children. Conversely, creating a Success Planning structure to understand children's individual needs without a coordinated system of supports to back it up limits the effectiveness of that strategy.

Children's Cabinets and Success Planning are two parts of a whole system, in which the information gathered by the Navigators can serve to identify the supports and opportunities for individual students and to compile aggregate information about students' needs. The Children's Cabinet has the authority and capacity to act on this information by conducting a community-wide asset map and needs assessment to identify—and address—gaps in services.

EdRedesign has been convening and collaborating with a group of about ten communities to establish and sustain local Children's Cabinets since 2014. Called the *By All Means* consortium, this group of communities is building cross-sector, cradle-to-career systems to support children's wellbeing. We also coordinate the Local Children's Cabinet Network (LCCN), which has over 45 members, with the Children's Funding Project and the Forum for Youth Investment. These collaborative action initiatives arose from the urgent need to create coordinated, community-wide systems to support children's education and development rather than the fragmented and siloed programs and agencies that are the norm in most communities.

To develop the second part of our theory of change, EdRedesign launched an effort to create a Success Planning framework in 2019, with the publication of *Success Plans: Promising Tools for Customizing Student Supports and Opportunities* and an accompanying toolkit to help schools and communities get started on the process. This framework distills key elements of several models for personalizing supports for children, emphasizing both the importance of one-on-one relationships between adults and children and integrated, comprehensive supports. Since our initial report, we have continued to develop our vision for Success Planning and have also worked to support those enacting their own versions. The communities in *By All Means* have identified points of entry for creating personalized supports and opportunities for children, with some partnering with national models while others are developing their own.

Recognizing that communities have different needs and capacities, EdRedesign has developed a set of guiding principles and core elements for Success Planning rather than a single model. Through our initial research, we identified 10 guiding principles that embody our comprehensive vision for Success Planning. These principles are intended to inform the overall design of Success Planning efforts rather than be prescriptive. Operationalizing each principle varies based on individual communities' needs and preferences. For example, "relationship-driven" might entail a school enlisting teachers to serve as Navigators and cultivate connections with each student, while another school might partner with a youth-serving nonprofit organization and employ AmeriCorps members for this role. The full set of principles is outlined on the following page.

# 10 GUIDING PRINCIPLES



## RELATIONSHIP-DRIVEN

Build a system of adult "navigators" who know students well and have the capacity to develop individualized plans and facilitate children's access to supports



## ACTIONABLE

Establish clear strategies, processes, and structures for identifying and delivering supports and services to each child and youth both in and out of school



## EQUITABLE

Eliminate systemic disparities that disproportionately affect students of color, low-income children, those with learning differences, and English learners



## CROSS-SECTOR

Provide coordinated, comprehensive services by creating a clear structure and establishing collaborative relationships with partner organizations across multiple sectors



## STUDENT-CENTERED

Empower children and youth to discover and pursue their academic and non-academic strengths and interests, set short- and long-term goals, and identify needs



## INFORMATION-DRIVEN

Utilize feedback and data from multiple sources, including students, families, and a diverse set of agencies, to regularly assess impact on multiple outcomes and enhance the quality of services provided



## PERSONALIZED

Celebrate each child's assets and use a customized approach to create a plan and identify individual strengths, interests, and needs



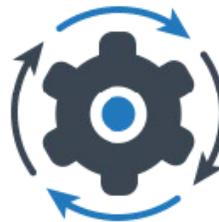
## SECURE

Use digital platforms that meet high standards of data security and protect student and family privacy



## COMPREHENSIVE

Connect with a wide array of academic, health, and other support services to meet the needs of children and youth from cradle to career



## SUSTAINABLE

Identify long-term funding sources and create organizational structures to ensure consistent implementation over time

# Success Planning Components

There are four core components of a comprehensive system of Success Planning. These are:

- A Navigator—an adult who forms an individual relationship with a child and, ideally, their family, and develops an understanding of the child’s needs and interests;
- A plan for action and a process for enacting it;
- A coordinated system of supports and opportunities;
- A data platform to capture information over time.



Different communities have conceptualized these pieces in a variety of ways, designing the approach that best fits their needs, capacity, and goals. In some cases, for example, the Navigator may also have some responsibility for developing and enacting the action plan, while in others those functions are handed off to a separate person or team. We describe each of the functions below, followed by a discussion of some of the design choices for communities embarking on Success Planning.

## Component 1: Navigators

Supportive relationships between adults and children are at the heart of Success Planning. As the research shows, positive relationships are essential for children’s learning and healthy development. The disconnect from school during Covid for many students has also shown how many lack this kind of relationship outside their homes and how crucial it

is. Beyond the value of the relationships themselves, Navigators play the essential function of gathering essential information about children's needs, strengths, and interests and documenting it in a way that enables action. If the Navigators are not trained counselors or social workers, it is especially important to design a structure for Success Planning that includes backup support to address issues beyond the Navigators' training and expertise.

## Component 2: Plan for Action

While the relationships between Navigators and children have value in themselves, the goal is to build on the knowledge of each child gleaned from these sessions to develop a concrete plan for action. This should include referrals to a range of supports and opportunities that can change over time as the child's needs and interests change. Key to doing this is having the staffing and infrastructure to create and update the plans and to provide the connective tissue between children and families and supports and opportunities. In some cases, the Navigator might also be the one to develop the plan and identify supports, but often there will need to be another person or team to fill this role.

## Component 3: System of Supports

For the plans to be meaningful, there needs to be a set of opportunities and supports available. Every school and community already has at least some supports and partnerships. Ideally, communities will have or create some form of coordination across agencies and organizations that serve children in the form of a Children's Cabinet or other body. The coordinating body can help ensure there are programs available to meet the most pressing needs and that these are coordinated to ensure equity and access.

## Component 4: Data Platform

Capturing information about children as well as about the plan for action requires a data platform of some sort. This platform should have the capacity to contain data gathered from meetings with Navigators about students' needs and interests and to incorporate or link to academic data. Success Plans also need to capture the supports recommended in the plan and information about which ones children are actually participating in. These platforms can range from expansions of existing data platforms or built on low-cost, readily available software to comprehensive platforms customized to the needs of a specific community or school district.

# Design Questions for Success Planning

Success Planning is adaptable, and communities will need to make deliberate choices about how they want to design and implement their student support efforts. The first decision is whether to partner with an organization that has designed its own model or to create something on their own, building on their existing student support structures and data systems. In either case, **communities don't need to start from scratch**. Partnering with an existing expert and organization has the advantage of moving the effort along much more quickly, since the elements and process are already defined. The partner organization can offer a structured implementation process, training, and technical assistance, and possibly support on data collection and analysis. The disadvantages may include cost, reduced flexibility, or reduced control over data use and integration with existing platforms. Each organization has its own model, which may or may not align with a community's priorities and needs so careful vetting is important. Select organizations will be profiled later in the report, including City Connects, a national student support organization that is partnering with dozens of schools in the United States; Communities in Schools; BARR (Building Assets, Reducing Risks); and others. Communities may also adopt a model and later change direction. This occurred in Hamilton County Schools in TN, which is implementing an approach adapted from its earlier City Connects partnership.

Notably, Success Planning is compatible with student support structures such as a Multi-Tiered System of Support (MTSS) framework, which aims to address the academic and behavioral needs of all students within the educational system. This tiered model of prevention and intervention includes universal programming to provide a foundation of supports for all students (often referred to as Tier 1) alongside targeted (Tier 2) and intensive (Tier 3) interventions to meet the varying needs of students.<sup>14</sup> Success Planning aligns with the MTSS framework because it is both universal (provided to all students) and targeted (identifying and coordinating additional resources to support student needs). As such, Success Planning can be implemented as part of a MTSS framework. School districts in rural southern IL and Nashville, TN both took this approach, integrating Success Planning as part of their current student support structure and aligning with their MTSS framework.

Communities that develop their own approach to personalized supports must consider a number of design options and determine their point of entry. There is no wrong way to begin; rather, communities may choose to direct their attention to any core component depending on their goals. For instance, communities may opt to begin with identifying individuals who can fulfill the Navigator role if expanding students' access to positive relationships is their initial priority. Alternatively, communities may choose to focus first on building their system of comprehensive supports if a viable technology solution is readily

available.

## What is the point of entry for schools and communities?

Each school district or community deciding to create their own version of Success Planning will need to decide where to begin. Given the importance of relationships and the need to understand each child's specific learning and other needs, developing a system of adult Navigators can be a logical starting point. The school districts in Nashville, TN, Unity Point, IL, and Burien, WA took this approach and established networks of adults within each school who meet with students and assess their needs and interests. Others may choose to begin with another component of Success Planning, though, to build on elements already under development or with a lot of local enthusiasm and momentum. The Jefferson County Public Schools in Louisville, KY, for example, has begun with the creation of a sophisticated data platform that will vastly improve service referrals and coordination. Similarly, the Oakland Unified School District in Oakland, CA decided to build a robust data platform to significantly enhance its referral system and connect students more seamlessly to comprehensive supports.

## What does the Navigator do?

The scope of the Navigator's responsibility can be narrow or broad, but the core element of the role is to meet regularly with students and form meaningful relationships with individual students and, ideally, their families. This ensures each child has a trusted adult in addition to their family who knows them well. Research shows that this alone will serve as a positive force for students, but it also has the practical value of providing a conduit for gathering information about students' needs and interests, creating individualized plans for each student, and putting those plans into action. The frequency of meetings varies from weekly to several times a year, and the duration of meetings also varies.

## Who serves the Navigator?

The most basic question about who will serve as Navigator is whether to use existing staff or hire additional people to fill that role. The answer in any community will need to consider issues related to cost, time allocation, skills, and the scope of the Navigator role. Those serving as Navigators could be existing teachers, counselors, support staff, AmeriCorps volunteers, or staff at community-based and afterschool organizations. Using existing school or program staff has the advantage of cost savings and of building on existing relationships between adults and children.

While Navigators may have a range of backgrounds, there are some key competencies they should all have. Those who meet with children should have the ability to connect with

individual students and their families and develop supportive relationships. They should also have skill in collecting relevant data. Depending on the scope of the Navigators' role in a given district—for example, whether the Navigator is responsible for connecting students with supports or whether that is the job of a separate coordinator— other important skills for Navigators include:

- Ability to match students' needs with necessary supports and services
- Ability to map existing resources that meet the identified needs and to develop and maintain external partnerships as appropriate
- Familiarity with referral processes and follow up
- Ability to engage families in the school community, including involving them in the planning process and connecting families to appropriate resources
- Skills in collecting, analyzing, and presenting data on a variety of metrics such as attendance, behavior, school climate, and academics (assessing individual student and schoolwide data)
- Ability to collaborate effectively with teachers, administrators, and other school staff

## What training and support do Navigators need?

Even those who already interact with children regularly, such as teachers and afterschool program staff, feel they need additional training and support for this new role. Some communities have developed formal training sessions that address interacting one-on-one with students as well as scripts for Navigators to use during their meetings. The Nashville Public Schools, for example, has created a comprehensive training guide that includes a set of structured scripts. Even with these additional supports, it is important to recognize and make explicit the limits to the Navigators' expertise and roles and have a strategy for connecting students with serious issues—such as an acute need for mental health supports or for dealing with sensitive challenges—with professionals who have the training to address them.

## What information will Navigators gather?

Establishing strong, supportive relationships between adults and children has value in itself, but the goal of Success Planning is broader. The role of Navigators is also to gather information about children's needs and interests as a key step in connecting children—and ideally, families—with the supports they need to thrive. This information-gathering should capture academic as well as non-academic needs and interests, including social-emotional wellbeing and social supports. Depending on how the role is envisioned, Navigators may conduct assessments of academic skills, social-emotional wellbeing, interests and skills, and needs for social services support. Most will at a minimum collect basic information that can be combined with academic records and other information to

create the Success Plans.

## What supports and opportunities are included in Success Planning?

School districts and communities embarking on Success Planning should take some time to create an asset map of the resources they have available for children and families and the process involved for accessing them. Some may already be easily available; others, less so. Inevitably, there will also be gaps between the needs for support and existing programs and resources. Ideally, Navigators and those enacting the plan will be able to tap into a robust, coordinated set of academic, social-emotional, enrichment and afterschool, health, and social services supports and opportunities. If these are more limited, communities should begin with what they have and develop strategies to expand over time. With the new federal American Rescue Plan (ARP) funding available over the next few years, communities have a unique opportunity to invest in vital services and supports.

## What data platform should schools or communities use?

Those implementing Success Planning will need a way to capture a variety of data: the information Navigators gather during their meetings with students and families, the plan for action, and ideally, specifics about supports and services to which the student is being connected. Data collection is also important to show the impact of Success Planning, from the number of Navigator meetings and new supports to, ultimately, improved outcomes for children. The options range from free platforms to expanding the capacity of existing ones to building completely new, sophisticated data platforms. The more sophisticated platforms can link a range of student data with information about and even referrals to a wide range of supports and services—but they require substantial financial and time investments to develop and implement.<sup>15</sup>

## Important Considerations

### Equity

Success Planning is conceived as an equity intervention that can mitigate the disparities across different races, learning differences, and economic and English language status. By ensuring each child has a personalized plan for support and opportunity, this strategy values each child as a unique individual with talents, interests, and needs that differ from

others. As with most things, though, thoughtful implementation with equity at the center is the key to matching the reality with the goals of Success Planning.

Ensuring equity in Success Planning requires using an equity lens at each stage of the process. Some key questions for communities to consider include: Are Navigators available to all students and families equitably, regardless of language, disability, or neighborhood? Are the plans for all students focused on developing interests and building on talents as well as meeting needs for support? Are opportunities available equitably to all children and families?

## Time

Success Planning takes time, and district leaders need to think creatively about how to redesign schedules to allow for it. The most obvious need is for regular opportunities for Navigators to meet with children and families, but training Navigators, conducting any formal assessments, developing action plans, and implementing them also require dedicated time and capacity. The amount of time Navigators need will depend on the scope and frequency of their meetings as well as the number of children and families each one serves. It is important to recognize the time commitment required for Navigators and to reduce or modify other responsibilities to account for this.

## Cost

It's difficult to estimate the cost of Success Planning since it varies so widely depending on the specific design of the program. There are ways to implement Success Planning with little additional cost, by using existing staff, free data platforms or ones already in use, and connecting children and families with services and supports that already exist. Partnering with an organization generally requires payment, but it also comes with programmatic and other supports. Those able and willing to make investments or raise new funding for Success Planning have designed new, robust data platforms to capture information, house the Success Plans, and refer to supports.

## Establishing Defined Roles

Those already implementing Success Planning stress that it is important to clarify who is responsible for each element. Navigators may serve primarily as a trusted adult who gathers basic information about children's needs and passes those on to others, or they may conduct more formal assessments or serve as a case manager, identifying and even referring to necessary supports and opportunities. Other important roles include overall coordination of the effort, providers of services—from mental health care to enrichment, academic, health and social service supports, and training for Navigators, data platform

# Spotlights from Around the Country

creators and managers, and data analysts to track and report data on the program's impact.

Many schools and communities are implementing some version of Success Planning—some in partnership with national organizations with defined models and others with more “homegrown” approaches. The following section features examples from around the country of communities that have pursued different paths in their Success Planning efforts.

First, we highlight **Metro Nashville School District in Nashville, TN**, which has designed its own Navigator program. We subsequently showcase national organizations that represent different models of student support, including **City Connects**, **Communities In Schools (CIS)**, and **BARR (Building Assets, Reducing Risks)**. These organizations were identified during research conducted for our [2019 report](#) as well as for a recent scan of other models and approaches that reflect similar concepts to Success Planning. We also profile **Hamilton County Schools in Chattanooga-Hamilton County, TN**, which has adapted an existing model to fits its current needs.

Next, we spotlight communities that have chosen different points of entry for their initial efforts. Some have begun with the Navigator role such as **Unity Point School District in rural southern Illinois** and **Highline Public Schools in Burien, WA**. In addition to these districts, **City Year** illustrates a creative staffing model that can enable Success Planning implementation. We also profile **Jefferson County Public Schools in Louisville, KY**, **Oakland Unified School District in Oakland, CA**, and a Baltimore-based nonprofit named **Thread**, which have invested their time and energy on building a system of comprehensive supports.

## Building on Existing Student Support Structures

### ***Metro Nashville School District in Nashville, TN***

*Really, my vision for our school is that every single student in the school has a village around them so if a kid is struggling then part of our role is to connect that student with the members in that village, who can intervene in that moment and set things back on the right path.*

-Jamie Jenkins, East Nashville Magnet High School, Executive Principal, Nashville, TN

The [Metro Nashville Public Schools](#), which is the second largest district in Tennessee and

serves 81,500 students, initially launched a Success Planning effort called the Navigator program (Navigator) as a strategy to support students during the pandemic. Through the program, the district sought to make “every student known, cared for, supported, and respected.”<sup>16</sup> It became such an integral approach that the district now considers the program “a non-negotiable.”<sup>17</sup>

The district has clearly defined the Navigator role, whose two main functions are to identify student needs and build strong, supportive relationships. The program aligns with the district’s multi-tiered system of support (MTSS) and acts to “supercharge it,” according to Keri Randolph, the district’s director of strategic philanthropic, state, and federal investments.<sup>18</sup> Each student in the district is paired with a Navigator from their school. Navigators act as mentors and advocates for their assigned students, providing an additional layer of support beyond the classroom teacher. They hold weekly one-on-one check-ins with their students to discuss social-emotional supports, academics, and any needs or challenges. Navigators might also use multiple formats to reach out to students; for example, Navigators distributed online surveys to provide students with another option through which they could elevate their needs, questions, and interests.

Any school-based staff may serve as a Navigator, including teachers, front office personnel, and cafeteria staff, among others. Ideally, the Navigator already has a relationship with their assigned student so they can build on existing connections. The district also intends for Navigators to remain with the same families across grade levels. Each Navigator has a cohort of approximately 12 students that they meet with weekly, and the district tries to keep cohorts as small as possible to facilitate targeted, responsive student support and manageable workloads. During remote learning, check-ins mostly occurred during school hours or immediately after school. For in-person students, check-ins happened during the school day, often during personalized learning time, or outside of the school day via phone or video conference. The program also involves a Lead Navigator who helps coordinate and support Navigators, and a school-level leadership team that includes social workers and counselors. While Navigators did not receive additional pay during the program’s first year, the district is planning to provide a stipend for work beyond the traditional school day.

The district delivers training and support for Navigators. They are provided with a [handbook](#) and short initial training video, then receive ongoing training and support throughout the year. The handbook includes scripts to assist in conversations with students and families, as well as access to translation services if needed. The scripts are relatively scaffolded and provide more structure initially and then taper off. Each week includes required questions as well as examples for icebreakers and relationship-building activities. The handbook also includes tips for families to support their children’s learning based on age group. It lists resources that Navigators can connect students to as needed, as well as directions to connect with other staff if Navigators have specific concerns or are

not sure how to provide support.

Navigators track students' needs by completing an online form and use another form for referrals as needed. Lead Navigators follow up to make sure a referral is generated. The form links to a live, district-wide dashboard that displays data across several core areas of concern, which is monitored by central staff who can provide additional supports as necessary, such as for housing instability. The dashboard captures data related to consistent technology and internet access, virtual learning/workspace, food security, housing stability, academic engagement, mental/emotional well-being, and enrichment and outside school activities. School leadership teams also have access to a live dashboard with school-level data. The district didn't incur costs for this technology since it leveraged internal resources. However, it has since purchased a more robust platform and check-in tool, which will be implemented during the 2021-22 school year.

Since the program began in August 2020, approximately 6,000 Navigators have held 360,000 check-ins with 60,000 students and referred students to nearly 2,800 supports and services (only 3 percent of students opted out of the program).<sup>19</sup> Recent survey data suggests that the approach is helping to realize the district's goal of "every student known." Metro Nashville Public Schools plans to continue to build on these promising results. "Navigator is here to stay," affirmed Keri.<sup>20</sup> She shared some key lessons and insights from their first year of implementation, including:

- The Navigator program matched a felt need for students/families and staff
- Keep caseloads for Navigators low
- Provide consistent support and meet schools where they are
- Create non-negotiables while also allowing schools to innovate
- Use program data to identify gaps in processes such as collaborative referrals
- Real-time data is a powerful tool
- Schools need to own the work and be supported in order to be effective

## Partnering with a National Student Support Organization

### City Connects

*[City Connects] creates a record for every child, so we know the kids, and we know what their strengths and needs are.*

-Mary Walsh, City Connects, Executive Director<sup>21</sup>

Based in the [Boston College Lynch School of Education and Development's Center for Optimized Student Support](#) in Boston, MA, [City Connects](#) is an integrated student support

approach, which is currently being implemented in elementary, middle, and high schools in six states, in addition to Dublin, Ireland. City Connects places a Coordinator, who is a trained school counselor or social worker, in partnering schools to act as a hub of student support. Coordinators work with classroom teachers to conduct reviews of all students and develop an individual support plan for each student. They serve as a single point of contact, connecting students and their families to customized supports both within the school and with external providers.

City Connects developed a proprietary online database called the Student Support Information System (SSIS). This database is implemented by each of the organization's partner schools and districts. Coordinators use SSIS to facilitate the implementation of the student support plans, maintain both individual and school records, monitor the provision of prevention and enrichment, early intervention, and intensive/crisis intervention services, and collect data to assess the impact of services on multiple outcomes. SSIS enables the collection of data on the student support plans, service referrals, and the school-and community-based providers that deliver services. The database also creates dashboards and provides prompts to Coordinators to monitor and adjust the support plans on an ongoing basis. This database has systematized the referral process. As a result, a Coordinator can effectively and efficiently serve up to 400 students.

Extensive studies show that City Connects improves multiple student outcomes.<sup>22</sup> The model is associated with higher academic achievement and attendance as well as lower retention, chronic absenteeism, and high school dropout rates.<sup>23</sup> Additionally, recent research indicates that City Connects helps maintain the positive impact of preschool and increases the likelihood of postsecondary enrollment and attainment.<sup>24</sup>

The cost per school to implement City Connects is based on many components and can vary depending on several factors, including the number of schools in a district, the student support configuration of the district, and the capacity of the district.

Salem, MA, a former *By All Means* community and current Local Children's Cabinet Network (LCCN) member, and Poughkeepsie, NY, a current *By All Means* community, are partnering with City Connects. In Salem, Salem Public Schools launched City Connects four years ago and is now serving approximately 3,000 pre-K-8 students. All pre-K-8 students receive a review of their individual strengths and needs and have a student support plan. During the 2019-20 school year, nearly 30,000 services were provided to students.<sup>25</sup> (The district recently partnered with BARR to implement its student support model at the high school level.) In Poughkeepsie, the Poughkeepsie City School District will implement City Connects beginning with approximately 300 6<sup>th</sup> grade students during the fall of 2021. The district plans to expand City Connects to all pre-K-8 schools in subsequent years.

## Communities in Schools

*It's relationships, not programs, that change children.*

-Bill Milliken, Communities In Schools, Founder and Vice Chairman<sup>26</sup>

A national network of independent nonprofit affiliates, [Communities in Schools](#) (CIS) in Arlington, VA seeks to surround elementary, middle, and high school students with a community of support and provide access to vital resources. CIS is currently partnering with nearly 3,000 schools in 26 states and Washington, D.C. CIS affiliates partner with schools, community agencies, and businesses to implement an integrated student supports model. The goals for providing support services differ by type of school and school needs. At the elementary school level, goals often focus on attendance, parent engagement, and social and emotional development. Middle school goals address behavior and social and emotional development, while high school goals focus on persistence, completion, and college and career readiness.

Services are delivered to students according to tiered levels. Tier 1 services are available to all students enrolled in the school to address school-level risk factors, Tier 2 services are targeted programs available to groups of students with common needs, and Tier 3 services are often more intensive and designed to address individual students' needs. Students needing Tier 2 and 3 services participate in CIS case management. The Site Coordinator, who typically has experience in social work, develops individual plans for students receiving Tier 2 or 3 case management services. The CIS Site Coordinator and the student support team conduct regular reviews with students to monitor progress regarding achieving their individual goals and adjust the plans and services as necessary.

CIS affiliates have access to a comprehensive online data management system licensed by CIS. This system enables users to implement the core components of the CIS approach. In addition to serving as a platform for storing different types of data entered by the Site Coordinator, it includes workflows for users to create both school and individual assessments and plans, monitor progress, and facilitate other core components of the CIS model. The system also houses multiple years of data for all students so that users can track progress and establish baseline metrics for upcoming years. Site Coordinators have access to an online searchable database of evidence-based interventions and providers so that users can find services by population, risk factors, or outcomes.

Studies of the CIS model suggest promising outcomes, including improved attendance and graduation and reduced dropout rates.<sup>27</sup> An evaluation of the CIS case management services found that these supports helped improve high school students' engagement in school, their attitude about school, and their belief in the value of education.<sup>28</sup> In addition, an economic impact study indicated that CIS yields an economic benefit of \$11.60 for every \$1 invested in the model.<sup>29</sup>

The cost of implementing the CIS model varies by school. The salary for the full-time Site

Coordinator is based on geography and salary levels in the region; in some cases, multiple staff members will work in schools to share case management responsibilities so there is variance regarding the financial model for hiring and retaining site-based Coordinators and other staff members. CIS affiliates do not pay dues or fees for the data platform or online training.

## BARR

*In education, unfortunately there is a lot of emphasis on deficits. We're always trying to figure out how to help students with their deficits. The BARR model flips that on its head. It asks, what are students good at and how can we connect with them?*

-Superintendent Astein Osei, St. Louis Park Public School, St. Louis Park, MN<sup>30</sup>

[BARR](#) (Building Assets, Reducing Risks) is a national strengths-based educational model based in St. Louis Park, MN that leverages relationships and data to support 9<sup>th</sup> grade students during their first year of high school. Currently being implemented in 18 states, the model uses a set of eight strategies that include the following: focus on the whole student; provide professional development for teachers, counselors, and administrators, implement I-Time social-emotional learning curriculum; create cohorts of students; hold regular meetings of the cohort teacher teams; conduct risk review meetings; engage families in student learning; and engage administrators.

Through utilizing these key strategies, schools implement a cohort structure in which students take core courses together. This structure is intended to help facilitate relationships among teachers and students. Teachers in the cohort discuss each student's progress as well as their academic and non-academic challenges during block meetings. They also identify interventions to support students' growth and learning and opportunities for advancement. In addition to these meetings, a team of counselors and administrators conduct a risk review of students with more intensive needs and connect them to myriad services. The goal is to coordinate supports based on teachers and other school staff's shared knowledge of student strengths, interests, and needs.

A BARR coordinator, who works for the school either part or full time, coordinates the block and risk review meetings. BARR offers training and coaching for school staff. While information on the cost of implementing the BARR model wasn't readily available in the organization's materials, the model was found to be cost effective compared to other interventions.<sup>31</sup>

An evaluation of the BARR model shows several positive impacts, including lower course failure and higher grade point averages, improved student experience, and better teacher

satisfaction.<sup>32</sup> BARR also substantially reduced the opportunity gap in course failure between white students and students of color.<sup>33</sup> An earlier evaluation indicated that BARR also improved students' test scores, but this wasn't found in a subsequent study.<sup>34</sup>

## Adapting an Existing Model

### Hamilton County Schools in Chattanooga-Hamilton County, TN

*Success Planning has been one of our primary strategies for understanding what the individual needs and strengths are of our students and especially students who fall into subgroups or are underrepresented and underserved and then creating tailored solutions and resources to both capitalize on those strengths and meet those individualized needs. That really is the heart of equity work and Success Planning has been a core strategy for getting there.*

-Molly Blankenship, Chattanooga 2.0, Executive Director<sup>35</sup>

In Tennessee, [Hamilton County Schools](#) (HCS) in Chattanooga-Hamilton County launched Success Planning as a key strategy for achieving equitable outcomes for all students. According to the district, “Student Success Planning does away with the one-size-fits-all model of education and intentionally addresses every child’s comprehensive and personalized needs—in order to truly prepare all Hamilton County students for a bright future.”<sup>36</sup> In 2019, the district partnered with the national student support organization City Connects (described earlier in the report) and began to implement its model. Most recently, HCS offered Success Planning in 14 schools, serving over 5,000 students, and plans to expand to 22 schools (16 K-8 schools and six high schools) during the 2021-22 academic year.

During HCS’s partnership with City Connects, it utilized the City Connects proprietary platform, which captures academic, social-emotional learning, health, and family-related data. Unfortunately, this platform wasn’t compatible with the district’s data systems. As a result, the district decided to pursue a different approach in order to find a platform that could be integrated into its existing systems and be tailored over time to best meet its needs.

While HCS is no longer using the City Connects approach, it has maintained several core components. For example, the district continues to provide a tiered approach in which a teacher conducts a review of every student. Students with specific needs receive an in-depth assessment by what HCS calls a “success team,” a cross-departmental team of student support including school counselors, social workers, teachers, and other student support personnel. Based on this assessment, the team develops a student plan and makes referrals to both in- and out-of-school service providers. Student plans are reviewed on an ongoing basis and modified as needed.

In 2020, HCS hired a vendor to build a customizable data platform. While the new platform was being developed over the past year, the district relied on google forms for teachers to complete their student reviews. During this time, the district revamped its needs assessment process and began to administer a social-emotional learning screener. The main outcome that HCS tracked during the 2020-21 school year is the number of times a student was linked to a service. During the 2020-21 school year, all Tier 2 students in elementary and middle school received at least three connections to interventions or services, Tier 3 elementary students received at least four connections, and Tier 3 middle school students received over five connections.<sup>37</sup> (Data wasn't available at the high school level.)

Once the new platform is implemented during the 2021-22 school year, the district will more readily be able to track long-term metrics, including academic, social-emotional learning, and college- and career-readiness outcomes, as well as more specific information about the intervention provided, such as how frequently the student used the service. Success teams and community partners will develop "SMART" goals for students, which they can use to measure students' progress. They will also be able to make automatic referrals to school- and community-based providers. As an initial step, HCS will test out the referral system with a set of partners during the fall of 2021 with a goal of implementing the platform in all pilot schools by the end of the year. Ultimately, the district intends to use the platform to identify which services have the greatest impact on student outcomes.

In addition to implementing a new data platform and scaling the effort, HCS seeks to refine its overall Success Planning approach. The district plans to pilot a system of Navigators with a select number of schools that will pair students with a teacher or other school staff who will meet with them regularly and forge supportive, caring relationships. Navigators will likely meet with K-8 students during advisory periods and with high school students during homeroom. The goal is to match students with the same Navigator from year to year to foster a trusting relationship over time. Schools will be able to choose Navigators for each student based on existing reports. Over time, HCS expects to expand the Navigator approach to additional schools. HCS also seeks to thoughtfully engage families in Success Planning and is currently exploring strategies for doing so.

## Creating a System of Navigators to Support Every Child

### Unity Point School District in Southern IL

*Getting to know your kids deeper is just so impactful as a teacher... You figure out how they learn best and what their challenges are... I'm seeing kids, they're growing as learners, it's like they are taking more ownership for themselves and they look at us, teachers, not as the authority... but ... we're going to work on this together and I'm*

*going to grow with you, and it's just such an empowering thing to see.*

-Ron Rogers, Unity Point School District, 7<sup>th</sup> and 8<sup>th</sup> grade teacher and coach, Carbondale, IL <sup>38</sup>

In rural southern Illinois, the [Unity Point School District](#), which serves approximately 560 students, has developed a robust Navigator system—what they call Individual Student Success Plans (ISSPs)—in which each student develops a caring relationship with a teacher or other school staff member who meets with them individually and supports their academic and social-emotional wellbeing. Unity Point is part of the statewide Partnership for Resilience, which is a member of EdRedesign's *By All Means* consortium. The district sought to build on its existing student support structure to develop a comprehensive approach to support a wider range of students, including students with learning differences and English learners. Unity Point launched ISSPs in the spring of 2019. This early effort focused on creating plans to prepare 7<sup>th</sup> and 8<sup>th</sup> grade students for a smooth transition to high school. Since then, the district has expanded the approach to all grades, from pre-K through 8<sup>th</sup> grade.

Teachers and school staff, including bus drivers and custodians, serve as advisors (similar to Navigators) and identify students' interests, strengths, and areas for growth. They co-develop a plan of action to guide each student's academic progress and social-emotional learning throughout the year. Students can express their preference for who their adviser may be and so they choose someone who they trust, leading to candid conversations. Advisors also intentionally involve families in the ISSP process, ensuring that they understand their child's progress and any specific needs. While ISSP meetings are required to occur quarterly, advisors and students typically connect much more regularly.

ISSPs include information on a student's academic performance, emotional/mental health, career interests, and civic/community engagement. They also contain transition plans for students who are moving to the next grade level. During ISSP meetings, advisers use an outline with guiding questions and existing student data which they jointly complete with the student and families. These meetings begin with questions such as "What are some things you feel you do well?"; "What are some things that are important to you?"; and "What can your teachers do to help you be successful in the classroom?" According to Superintendent Lori James-Gross, students have expressed the desire for teachers to know them well enough that they can tell when they are struggling and can reach out to provide support. Through the ISSP process, she has observed that these questions and conversations foster deeper knowledge of a student's circumstances, personality, and approach to learning.

“I feel much more culturally aware of what our kids need and what our kids have experienced in their home countries, and it just absolutely changed how I look at things and how I interact with students.”

- EL Coordinator Colleen Doyle-Parrott

In addition to academic progress, advisors support students' social-emotional development and assist them with goal setting. Questions related to social-emotional supports include asking students to list other students that they work well with and those that they don't work well with, if they receive extra help, formally or informally, and what adult they consider to be a safe person who they could go to for support.

ISSP meetings also provide an opportunity for advisors to support students with particular needs, such as English learners and those with learning differences. In addition to helping students with challenges they may be facing, advisors can gain a deeper understanding of each student. In the case of English learners, EL Coordinator Colleen Doyle-Parrott described how ISSPs have transformed her entire perspective.

“I feel much more culturally aware of what our kids need and what our kids have experienced in their home countries, and it just absolutely changed how I look at things and how I interact with students, as far as being comfortable asking them questions about their home country, their home language, and having them bring that into our school and share that with us.”<sup>39</sup>

An integral component of Unity Point's ISSP approach is ensuring that advisors are adequately prepared for their roles and can develop supportive relationships with students. To address this need, Unity Point partnered with [FuelEd](#), a national nonprofit that builds educators' social-emotional skills, to provide professional development in this area. Through this training, the district sought to equip advisors with techniques to discuss difficult topics with students as well as address the impact of secondary trauma, which can often occur as a result of what advisors learn about students and families' circumstances. Unity Point is continuing to support advisors through “Wellness Days,” which include a dedicated space called empathy circles during which they can share their personal experiences.

Unity Point's strategic focus on creating a strong advisor role is showing promising results. During the 2020-21 academic year, advisors met with 540 students and their families, representing 99 percent of the student body. These in-depth meetings provided an opportunity to cultivate closer connections with each child and family, gain a deeper understanding of their varied experiences during the Covid-19 crisis, and develop a concrete plan to support each student's academic progress and wellbeing during the pandemic and beyond. Developing self-advocacy skills in order to be placed into more

rigorous high school classes, setting additional academic goals, and building peer support systems are just some of the ways that ISSPs are making a clear impact on students' lives.

## Highline Public Schools in Burien, WA

*The pandemic may have forever changed the rules we have known and played by for decades. The question now is: Will we collectively seize this opportunity to rewrite those rules and reimagine and rebuild an education system worthy of our children?*

-Superintendent Susan Enfield, Highline Public Schools, Burien, WA<sup>40</sup>

Just outside of Seattle, [Highline Public Schools](#), which is home to 18,858 students, about 61 percent of whom are eligible for free or reduced-priced meals,<sup>41</sup> is reimaging the education system to better serve students. As the district has responded to students' myriad needs during the pandemic, it has sought to advance a more equitable education system. Highline Public Schools identified six core components to guide its overall vision: Each student has access to healthy food, broadband connectivity, an adult advocate in their school, an individualized learning plan, a team that provides academic and social-emotional support, and opportunities for learning throughout the year. "We now have the opportunity, and responsibility, to turn this wish list into an action plan," according to Superintendent Susan Enfield.<sup>42</sup>

As part of its strategy, the district created a relationships-based program called One-to-One Connections that they plan to continue going forward. This approach illustrates another example of the Navigator component in Success Planning. The One-to-One Connections model prioritizes one-on-one, two-way communication between every student and a consistent adult to ensure students are met where they are and are getting what they need. First, students are matched with an adult staff member with whom they already have a connection. Typically, teachers serve in these roles, but any school-based staff member—from administration to classified staff—can take the helm. The weekly check-in typically occurs during advisory or homeroom. The district engaged in a bargaining process with the union in order to implement the initiative.

Initially, informal weekly check-ins are conducted between outreach staff and a student and their family. During their time together, they gather baseline information to ensure that each student is meeting with their One-to-One match. One-to-One leads receive written guidance rather than prescriptive training so as not to dictate what the time with the student should look like. The communications are not academic or rote; instead, they are grounded in wellness and relationship building. One-to-One leads are encouraged to be curious, responsive, flexible, and caring. They also log anecdotal data to understand and diagnose broader needs and themes. The district primarily uses the program Tableau for its data

dashboards but allows schools to use their own tracking systems that staff have familiarity with, such as Excel or Google Sheets.

The model takes a tiered approach to administering supports based on the context of the school and individual student. Operating from a whole child perspective, the district sets parameters and shares guidance for schools and staff but doesn't set broad mandates that might constrict personalization. They leverage existing teams and structures within schools to identify what and how many supports students need. In addition, the district conducted an environmental scan to log which supports are already provided by external organizations and how best to work with them for wraparound support that avoids redundancy.

The district seeks to be nimble and incorporate feedback from staff who are implementing the initiative. For instance, the district received feedback that the burden of documentation was initially too cumbersome. In response, the district refined the process to incorporate flexibility around check-in frequency (depending on student need) and include more student voice. Staff also shared positive perspectives on the program, reporting that they found the one-on-one connections valuable. As Highline Public Schools continues to work toward enacting its long-term vision, the One-to-One Connections initiative represents a concrete step toward a more equitable system for all students.

## City Year

*This year, I've focused on building tutor-mentor relationships with students strong enough for them to feel like they have a real ally as they confront the challenges of virtual learning. My students know that if they have a question, I will always try to answer it, and that dynamic has resulted in rewarding conversations about their lives in and out of school.*

-City Year student success coach<sup>43</sup>

A national service organization based in Boston, MA, [City Year](#) utilizes a creative staffing model to deliver holistic, integrated supports to students in 350 under-resourced elementary, middle, and high schools in over 20 states. City Year recruits AmeriCorps members to serve full-time in schools as student success coaches. In addition to supporting students, City Year seeks to prepare AmeriCorps members to become civic leaders.

In their "near-peer" roles, student success coaches foster relationships with young people and help develop their social, emotional, and academic skills through one-on-one and small group tutoring and mentoring, classroom instruction support, afterschool programs, and other activities. Student success coaches monitor students' early warning indicators, such as attendance, behavior, and course failure, to help ensure they stay on track to graduate.

Full-time impact managers, who are hired by City Year, work at the schools, managing the partnership and training AmeriCorps members.

Research suggests that City Year has a high return on investment, improving students' attendance, behavior, and coursework.<sup>44</sup> Schools contribute approximately one-third of the cost for City Year, which is 78 percent more cost effective than if they were to work with individual service providers.<sup>45,46</sup> City Year also has a positive impact on alumni, who are more likely to be active community members and have pursued careers in multiple fields, including education.<sup>47</sup>

## Building a System of Comprehensive Supports

### Jefferson County Public Schools in Louisville, KY

*In Louisville, we've been able to leverage resources from so many different sectors. ...Working through this paradigm of collaboration has really allowed everyone to realize that they don't have to be everything to everyone, we can tap into the expertise of a wide variety of sectors and organizations.*

-Charles Davis, Evolve502, Chief Comprehensive Services and Data Officer

In 2019, Louisville's Metro United Way teamed up with Unite Us, a software company that builds coordinated care networks of health and social service providers across the country, to launch a coordinated care network called United Community, which comprises over 150 partners in Jefferson County and will soon include [Jefferson County Public Schools](#) (JCPS). Through this network, Louisville residents can now access an array of essential services—including food, housing, health care, and more—with fewer barriers. There is “no wrong door...regardless of where you enter the system, you will receive care,” according to JiJi El Masri, community engagement manager at Unite Us.<sup>48</sup> Partners in the networks are connected through the Unite Us shared technology platform, which enables them to send and receive electronic referrals, address people's social needs, and improve health across communities. Providing students with comprehensive supports and resources is part of broader work led by [Evolve502](#), the backbone organization for Louisville's cross-sector, cradle-to-career initiative. Nationally, Evolve502 is a member of EdRedesign's *By All Means* consortium, and the development of the Unite Us platform grew out of Louisville's commitment to individualize supports and services for children.

How does Unite Us operate? First, a provider screens a client and identifies a pressing need such as housing. She or he logs onto Unite Us, creates a record for the client, and uses the filter options to enter information such as the preferred distance and if the client

needs any specialized supports. The platform then retrieves a list of shelters meeting the set of criteria and generates an electronic referral that is automatically sent to the providers. This streamlined process helps ensure that the client is directly connected to the service and alleviates the need for the client to contact multiple providers on her or his own. In addition, Unite Us securely shares the client's information with the shelters rather than requiring that the client repeat her or his information multiple times. The software operates similarly to rideshare companies like Uber/Lyft by accepting the first provider that responds and using a recall function to cancel the request once that occurs. This helps to prevent the duplication of services and facilitates efficient delivery. The sending provider can track the client's case over time, receiving real-time updates on her or his progress.

Unite Us is compliant with a variety of federal data privacy requirements, including HIPAA and FERPA, and requires a one-time consent form, which can be completed by paper, online, and in various accessible modes. Consent is required from every person who has a client record in the network before information is shared. Parents sign the form for children under 18. Each provider can view a client's entire record, seeing all the services they have accessed in chronological order. Services related to mental and physical health, substance use, and legal issues are limited to only the agency requesting and providing the service.

A key feature of Unite Us involves the use of data to track outcomes and measure the impact of the coordinated care network. The platform captures metrics related to network coverage, such as number of programs by service type and county, and network impact, such as the average time for referral acceptance. All providers partnering with Unite Us must agree to adhere to a set of shared accountability standards. As an example, providers agree to respond to non-urgent referrals within two business days and urgent referrals within one business day. In addition, Unite Us is currently working to use predictive analytics to identify other needs that an individual may have in order to provide a full set of wraparound supports. For example, if an individual needs housing, she or he might also require access to a food pantry, transportation, and other resources. Unite Us provides ample training for providers that join its coordinated care networks, offering multiple onboarding options including webinars and self-guided tutorials. The company also provides ongoing tech support. In Louisville, Metro United Way and Aetna Better Health of Kentucky co-sponsor the United Community network and provide up to 25 free licenses for most community-based organizations.

In addition to transforming the referral process for providers, the United Community network is expected to vastly improve the delivery of supports and services for JCPS students. A technology challenge, however, has involved connecting the Unite Us platform with the district's student information system. The district had hoped to implement the Unite Us platform during the 2020-21 school year, but the Covid-19 pandemic and the technology issues delayed this plan. Instead, JCPS aims to begin implementation during the fall of 2021 when Family Resource & Youth Service Center Coordinators (FRYSCs) will begin using Unite Us to directly refer students to a range of supports and services and tracking

their outcomes. School counselors will also have access to the platform. Training of school staff is already underway. As schools continue to navigate the pandemic, access to a robust referral platform will be more important than ever, allowing JCPS to individually support the varied needs of each student.

## Oakland Unified School District in Oakland, CA

*Positive relationships are the entry point for learning, so you really need to create those conditions for kids to feel seen, to feel heard, to feel connected...*

-Superintendent Kyla Johnson-Trammell, Oakland Unified School District, Oakland, CA<sup>49</sup>

In Oakland, CA, school leaders are working to ensure each student gets the services they need, when they need them, “to operationalize equity,” according to [Oakland Unified School District](#) (OUSD) Superintendent Kyla Johnson-Trammell.<sup>50</sup> The district’s Coordination of Services Team (COST) supports students and their families, building trusting relationships and connecting them to resources and opportunities. “The COST team really comes together as a community of leaders to say okay, with all these touch points and relationships that we know we have with the student, how can we come together creatively to make sure that their needs are lifted up and supported?” explained Nicole Anderson, program manager at Oakland’s Korematsu Discovery Academy. This effort to meet the comprehensive needs of students is a part of Oakland’s longstanding community schools and collective impact agenda now overseen by the Oakland Thrives Leadership Council. Nationally, Oakland is a member of EdRedesign’s *By All Means* consortium, and the development of the student support tool grew out of the community’s commitment to individualize supports and services for children through Success Planning.

In order to facilitate even greater access to wraparound supports, OUSD jointly developed a student support tool with the software company Salesforce.org. In partnership with Salesforce.org’s Education Cloud for K-12 team, OUSD built the tool to collaboratively triage individual student needs, provide support services, and track outcomes. In the spring of 2020, the district launched the tool in five community schools—over half of the district is composed of community schools—and has since expanded the tool to all community schools.

The district has a longstanding relationship with Salesforce, which has provided support to build multiple data management systems, including fundraising and volunteer management, asset management, and expanded learning program management systems. The student support tool aligns well with the expanded learning program management system, which created a centralized repository of OUSD’s service providers.

The previous referral process involved teachers and student support staff using varied methods—mostly paper and online spreadsheets—for connecting students to resources. With the new student support tool, OUSD can create a streamlined process in which it connects students to services more quickly, matches students with the right support, and measures the impact of interventions. “From very early on in our community schools work, we had a vision of having a universal, single point-of-entry student record that would allow us to track what services and supports every student was receiving at every school,” said Curtiss Sarikey, OUSD chief of staff.<sup>51</sup> The new tool enables teachers and community school coordinators (who staff COST) to connect students to a range of individualized supports and services and systematically track outcomes. The streamlined process generates automatic email updates for staff, keeping them informed about each step, including intake, connection to services, receiving services, and closed (i.e., the service was provided). The platform is HIPPA- and FERPA-compliant and enables users to limit access to protect student privacy. For instance, staff who are making referrals can only see certain information, while administrators can view the full record.

While the student support tool built on Salesforce is still nascent, OUSD is already seeing—and hearing—positive results. Data from the initial rollout in the spring of 2020 shows that 94 percent of referrals were reviewed and assigned to the next step for follow up and that it took 36 percent less time to match a student with a service, indicating that students are being quickly connected with supports. Early results also found an estimated 45 percent increase in referral-to-service matches. During the coronavirus pandemic, OUSD has leveraged the student support tool to continue to connect students to necessary supports no matter where learning is taking place.

OUSD plans to build on the progress underway and expand the student support tool to other schools. During the 2021-22 school year, the district aims to scale the tool districtwide. OUSD’s work serves as an example to other districts and schools that want to follow a community schools model. The district’s partnership and work has also been valuable to the Salesforce.org team, informing their own product development for Student Success Hub as a platform for schools to deliver more equitable and holistic student support from anywhere.

## Thread

*My experience with Thread has been a revelation of endless opportunity that has helped me realize my own potential. Thread brings people together that normally wouldn’t know one another and uses the different perspectives, experiences, and knowledge to learn from each other and cultivate better and more well-rounded individuals.*

-Thread student<sup>52</sup>

The Baltimore-based nonprofit [Thread](#) seeks to connect youth to a robust support system—what becomes “a new social fabric”—to help them overcome systemic barriers. Starting in the 9<sup>th</sup> grade, the organization makes a 10-year commitment to students who are performing at the bottom 25 percent of their 9<sup>th</sup> grade class, preparing them to graduate high school and attain a postsecondary credential. Thread is currently partnering with six high schools in Baltimore City. Since its founding, the organization has served over 650 students.

In contrast to the other examples profiled in this report, Thread’s model of student support centers on volunteers who fulfill multiple roles. Thread pairs students with university and community-based volunteers who offer customized support to youth for at least one year. The organization also engages volunteer “collaborators” who provide pro bono services and resources. In addition to receiving individualized support from a group of up to five volunteers, youth and their families participate in an extended support network, which includes a total of eight students and their families. This extended network offers peer-to-peer support and is guided by experienced volunteers who are called GrandParents. Thread trains and mentors volunteers who gain core competencies, cultivate their leadership skills, and develop their networks while simultaneously supporting youth and families.

Through Thread’s intensive, relationship-based model, youth and families are able to access an array of essential resources. Volunteers pack lunches, drive students to school, provide tutoring, and link students and their families to various community-based services, among other activities. In addition, collaborators offer a range of pro bono professional services to students, volunteers, and to Thread.

Results are impressive: 85 percent of students in the program graduate high school within six years of enrollment, and 83 percent attain a postsecondary credential within 10 years.<sup>53</sup> Looking ahead, Thread aims to improve the trajectories of even more youth, with the goal of enrolling approximately 7 percent of 9<sup>th</sup> grade students and nearly 60 percent of high-needs students.<sup>54</sup>

## Key Takeaways

### Start Wherever You Can—But Don’t End There

In its full form, Success Planning brings together supportive relationships, a plan for action, a comprehensive system of integrated supports, and a data platform into a powerful whole. This can be too much for a community to take on at once, both operationally and financially.

Choosing a more limited starting point or a more basic structure can be a good way to get started and to implement meaningful pieces of Success Planning in a relatively short time—but at the same time, communities should develop a plan for building the other components of Success Planning. They should also embed Success Planning within a comprehensive strategy in which the data about individual students' needs is aggregated to create an understanding of community-wide needs, with a Children's Cabinet overseeing and coordinating a broad set of solutions.

## Ensure Navigators Have Support

For adult Navigators, learning the full scope of needs and challenges children and families experience can be traumatic. District leaders have told us that Navigators often experience secondary trauma and need support to manage it. It is important for communities to be aware of this and to develop strategies to support Navigators, particularly those who are serving in that role without formal training as counselors or social workers. Some communities have addressed this, in part, by partnering with organizations that support the mental health of adults through trainings. EdRedesign has developed a [resource guide](#) to provide more guidance. Having a strong backup system to address the child and family challenges Navigators learn about is another important support so Navigators can hand off responsibility for addressing the needs they hear about to those with more expertise.

## Develop a Strategy to Create Demand and Buy-in

Creating a new system of Navigators and individualized supports within schools means a lot of changes for people's roles and the use of time and money that impact children, families, administrators, teachers, and other staff. Those designing and implementing Success Plans—or adopting a national model—should have a plan to communicate the reasons why this new approach is worth the effort and how it can benefit everyone within the community. We have created several short videos that can help with this. View our [Success Planning Guiding Principles video](#), [Voices from the Field video](#), and [Success Planning explainer video](#).

## Build Metrics and Evaluation into Your Plan

Tracking both the implementation and the outcomes of Success Planning has a number of benefits, from creating a picture of the scope of the effort—by showing, for example, how many meetings Navigators have had with students or how many services and supports children have actually received—to identifying changes to relevant student outcomes. In our [Success Plan toolkit](#), we offer a comprehensive set of metrics that communities looking for a starting point can choose from for their Success Planning efforts. City Connects and

Communities In Schools have also identified robust sets of metrics for this work, and the Metro Nashville Public Schools have created a dashboard that compiles comprehensive information on their new Navigator system.

## Conclusion

More than ever, children need to be known and supported as individuals with unique needs and strengths. The pandemic has both exacerbated and made visible the vast disparities in access to opportunities and resources experienced by children and families. We have an opportunity, and an obligation, to seize this moment to create transformational changes in the way we educate and support children. We know that a one-size-fits-all strategy does not work, and we have a roadmap to a new design that identifies each child's strengths and needs and creates a comprehensive plan to meet those needs.

# Appendix: Resource Guide

## [Equipping Navigators to Support Students—and Themselves](#) (March 2021)

- Provides curated free resources for Navigators related to mental health, communication family engagement, and crisis intervention

## [Choosing a Data Platform for Individualized Success Planning: A Guide for School and Community Leaders](#) (October 2020)

- Identifies key considerations for choosing a platform and showcases a range of examples

## [Planning for Student Success During Disruption: A Relationship-based Strategy for Supporting Each Student](#) (August 2020)

- Outlines a clear set of actions for integrating Success Planning into school reopening efforts

## [Getting Kids Back on Track: Supporting Students During the Covid-19 Crisis Through Individualized Success Planning](#) (June 2020)

- Explains how schools can use Success Planning to support students during the pandemic and beyond

## **Success Plans: Promising Tools for Customizing Student Supports and Opportunities** - [full report](#) and [executive summary](#) (April 2019)

- Explores how personalized plans for each child have the potential to reshape the education system and features a range of organizations and agencies implementing different types of individualized plans

## [Success Plans Implementation Toolkit](#) (April 2019)

- Contains worksheets and resources to assist communities in developing and implementing Success Planning

## [Metro Nashville Public Schools Navigator Handbook 2020-2021](#)

- Contains sample scripts for Navigator check-ins with students

## [Sample Success Plan](#)

## Sample Questions for Initial Student/Navigator Conversation

- What are some things you like to do outside of school?
- What subjects do you like best?
- How did the rest of the school year go for you after schools closed?
- Did you have any trouble joining the Zoom meetings last spring?
- How are you feeling about the coming year?
- What's something you're looking forward to this year?
- Is there anything you're worried about?

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